LeanData on LeanData

Five Powerful Revenue Plays From the LeanData RevOps Team Playbook

Call it what you want:

Eating your own dog food.
Drinking your own champagne.

Some of the most successful users of a SaaS tool are the creators themselves, and LeanData is no exception. One of the secrets of LeanData's growth as a company is the use of our very own technology to orchestrate revenue plays.

LeanData sits at the center of our tech stack, responding to signals and calling plays like a superbowl-winning quarterback.

Today we're pulling back the curtain on five powerful revenue plays used daily by the LeanData RevOps team. These plays reflect a combination of inbound, outbound, revenue protection, and data management motions that support our overall go-to-market (GTM) strategy.

Grab a pen.

You're going to want to take notes.

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Executive Summary

Executive Summary

No one knows how to capitalize on all the strengths of LeanData Revenue Orchestration more than our very own RevOps Team. They are LeanData experts. This ebook shares five powerful revenue plays that fuel our GTM motions.

PLAY #1: REPEAT CUSTOMER PLAY

The Repeat Customer Play is a strategy that combines LeanData with UserGems to identify our champions who have switched jobs. UserGems surfaces the champions and LeanData Revenue Orchestration goes to work: matching, routing, sending Slack alerts to team members, and enrolling the contacts into Outreach sequences.

PLAY #2: WIN BACK PLAY

The “Win Back Play” is a strategic approach to re-engage with churned customers, aiming to win back their business. When a customer churns, LeanData’s automation updates their information and assigns the account to the RevOps team. After six months, the LeanData Routing Scheduler automatically assigns the churned account to an AM or AE who uses Salesforce account information to gain insights and customize their outreach.

PLAY #3: SALES PROCESS PLAYS

To save time and create more efficient, scalable processes with the LeanData Sales team, RevOps automates the process of adding accounts and unassigning accounts. These two automations eliminate unnecessary communication and time-consuming manual processes that were previously maintained in a spreadsheet.

PLAY #4: RENEWAL & UPSELL PLAYS

In a down market when new customers are harder to acquire, one of the best ways to weather the storm is to strengthen your existing customer base by preventing churn or uncovering untapped revenue through upsells. The LeanData RevOps team uses automated renewal and upsell plays to protect customer revenue.

PLAY #5: PARTNER PLAY

Partner data is gold, but being able to bubble up the right information at the right time for revenue teams requires alignment between RevOps and Partner teams. To solve for this Partner/RevOps misalignment and eliminate manual processes, LeanData uses Crossbeam and LeanData solutions together to automate partner data and accelerate deals.

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Play #1: Repeat Customer Play

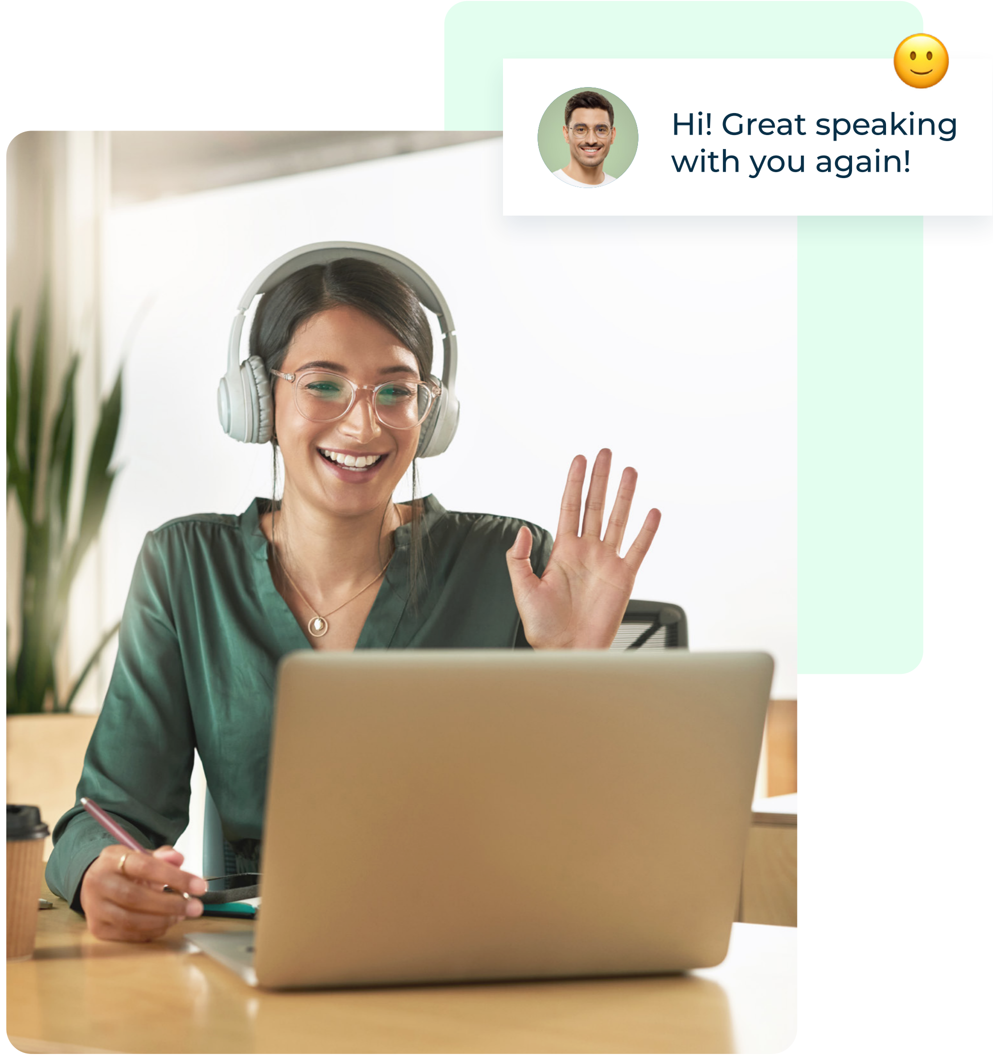
Customer Virality

One of LeanData's best outbound strategies taps into our relationships with past customers and product champions.

However, with so much job turnover, it can be a challenge to find former customers. A Pew Research study found that 2.5% of workers (about 4 million) switched jobs each month in 2022.

Enter LeanData partner UserGems, a native Salesforce application that supports customer virality by alerting sales reps when opportunity contacts and former customers change jobs.

In our Repeat Customer Play, the LeanData and UserGems platforms work together to drive repeat business by accelerating the identification of relevant buyers, improving lead and contact assignment accuracy, and re-routing lost opportunities for follow up.



Defining Viral Customers and Opportunities

LeanData's Repeat Customer Play segments potential buyers into four categories of job changes:

#1 Past Champion Contact:
A power user or champion of LeanData — this person was identified as a key contact post-sale and has now moved to a new company.

#2 Past "Closed Won Opportunity" Contact:
A contact added as a contact role to a Closed Won Opportunity in Salesforce who has moved to a new company.

#3 Past "Open Opportunity" Contact:
A contact added to an Open Opportunity in Salesforce who has moved to a new company.

#4 Past "Closed Lost Opportunity" Contact:
A contact added to a Closed Lost Opportunity in Salesforce who moves to a new company.

Incorporating UserGems into the LeanData FlowBuilder

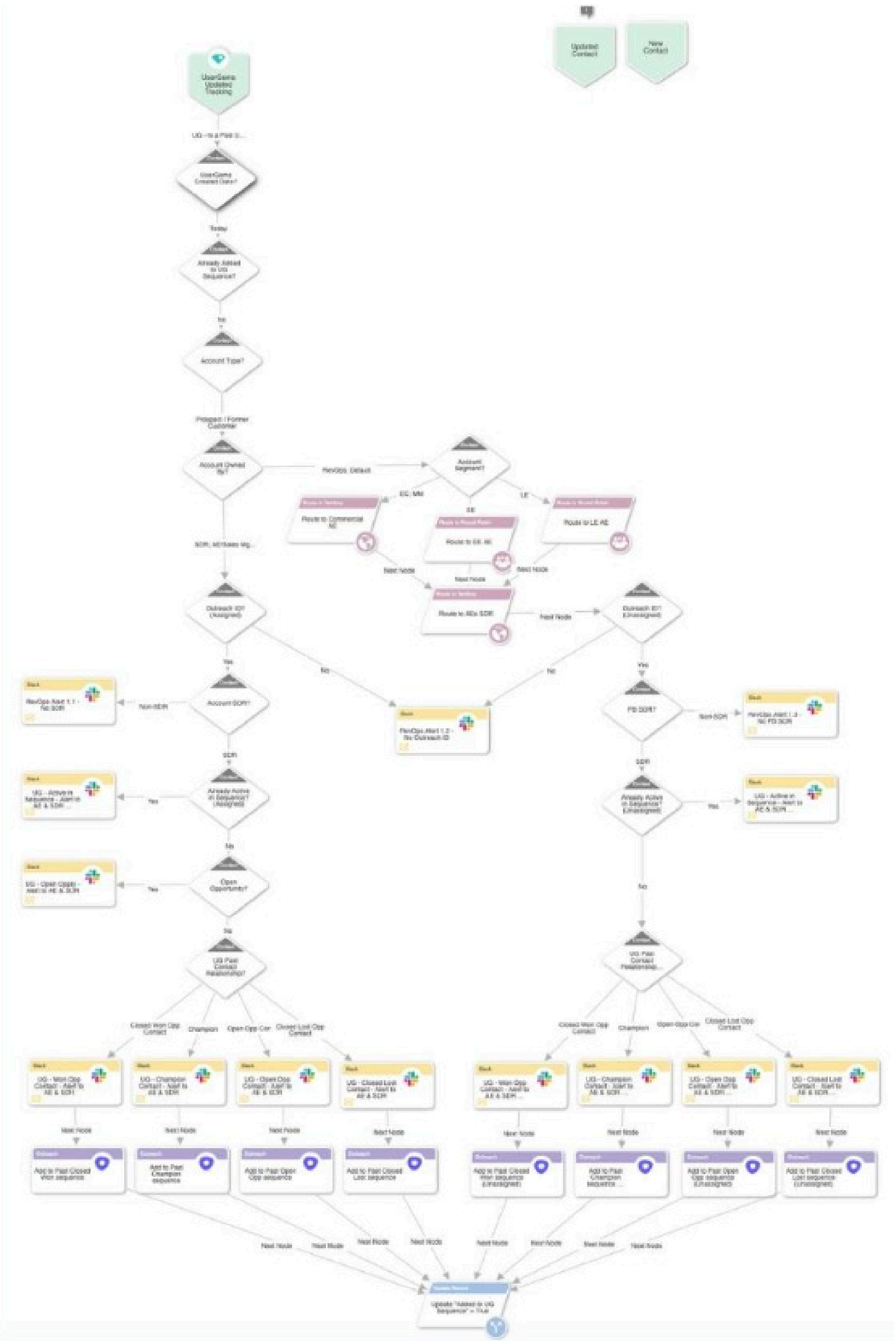
Once surfaced by UserGems, each category of potential buyer is automatically entered into a workflow in LeanData's FlowBuilder. The following four steps summarize the automated actions shown in the graph:

STEP 1: The LeanData Routing Scheduler automatically creates or updates new records for new job changes detected by UserGems. This can also be done with the UserGems trigger node.

STEP 2: LeanData matches new leads to accounts or updates existing contact records, and converts new leads to a contact. The routing flow round robins unassigned accounts and sends different alerts for assigned accounts, taking into consideration accounts or contacts that may already be active in an open deal cycle or Outreach sequence.

STEP 3: LeanData automates Slack alerts to the appropriate account executive (AE) or sales development representative (SDR) with context and the appropriate call to action. The SDR researches the contact and account, strategizes with their AE, and follows up within 48 hours.

STEP 4: LeanData automatically enrolls the prospect into a persona-based Outreach sequence.



Contextual Outbound Supported by Slack Alerts

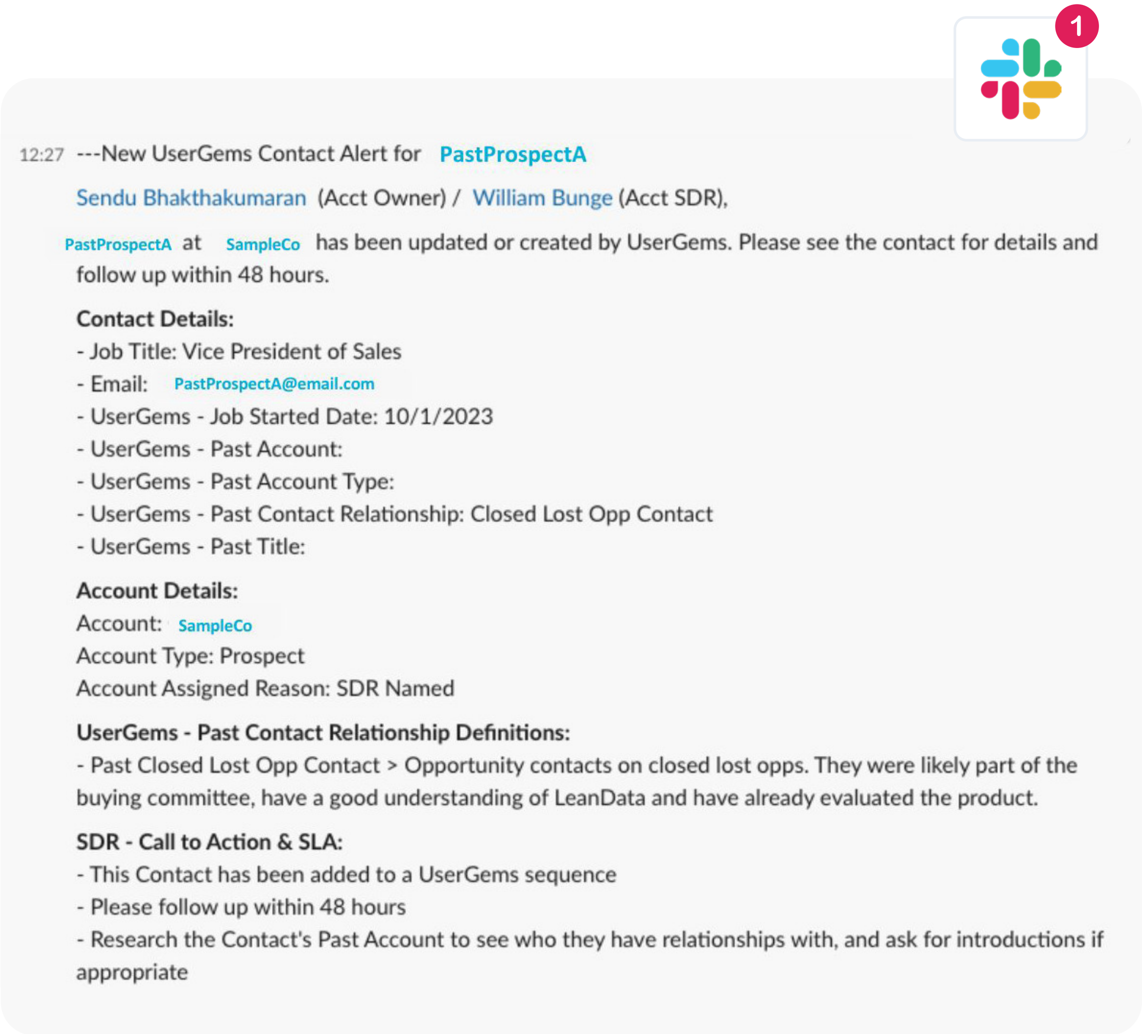
When the FlowBuilder graph automates a Slack alert to the appropriate LeanData sales rep, the alert is full of contextual information that helps personalize outreach. This contextual information includes the contact's past relationship with LeanData as well as their new job title, start date, company name, and new email address.

The LeanData sales rep can click on the contact name in the Slack alert and connect to the contact record in Salesforce. The contact record now includes a section for UserGems, providing context into the contact's past interactions with LeanData. The sales rep can investigate the previous account or opportunity to gain intelligence, or potentially identify a LeanData coworker to help make a warm introduction.

EVALUATE, ITERATE, REPEAT

This entire Repeat Customer GTM play is monitored and maintained by one SalesOps pro, a considerable time savings when compared with the custom code and manpower necessary to duplicate this same GTM motion in Salesforce.

LeanData's no-code, drag-and-drop platform makes it easy to evaluate the lead routing flow through detailed audit logs and make changes in real time.



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Play #2: Win Back Play

Win Back Customers Who Have Churned

In every company, some degree of churn is unavoidable.

A 2022 KBCM survey of 110 SaaS companies reported a median annual non-renewal rate of 10 percent. While the LeanData churn rate is not nearly that high, we love our customers and always want them to come back. Acquiring new customers is typically more expensive than re-engaging former customers as we already have some level of rapport and understanding of their needs.

Plus, churned customers provide insights into what went wrong, what features or improvements are missing, and why they left. This feedback helps LeanData enhance our products and services, benefitting current and future customers.

The Win Back Play reflects our process of re-engaging with churned customers in an attempt to win back their business.

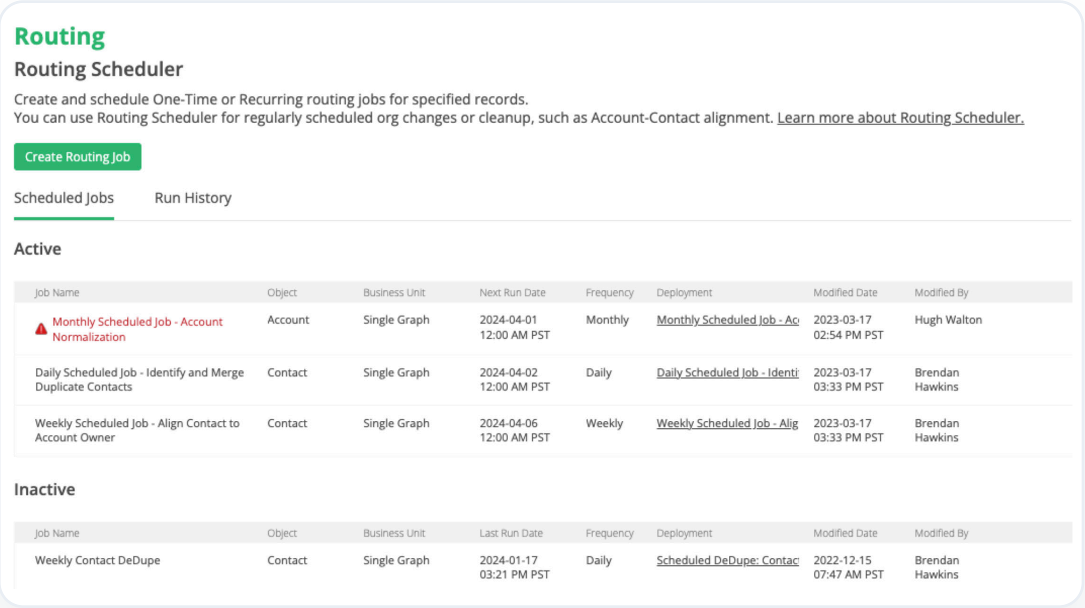
LeanData Automation in Action

On a tactical level, when a LeanData customer churns, our Customer Experience Team updates the Account Type in Salesforce to Former Customer. This action triggers LeanData automation to do three actions:

1. Update the Churn Date
2. Assign the Account to the RevOps Team
3. Clear all other assigned fields including Solutions Consultants, SDRs, CSMs, AEs and AMs

On a daily basis, the LeanData Routing Scheduler looks for accounts that churned, at minimum, six months ago. Then, depending on the reason for churning, LeanData automation will assign the Account to an AE and SDR and send each person a Slack alert with important contextual information which includes:

- Churn Date on the Account
- Closed Lost Reasons
- Any Account Status Details



Win Back Play Driven by LeanData

LeanData Routing Scheduler:

Routing job runs daily.

Checks Churn Date > If 6 or 12 Months since churn.

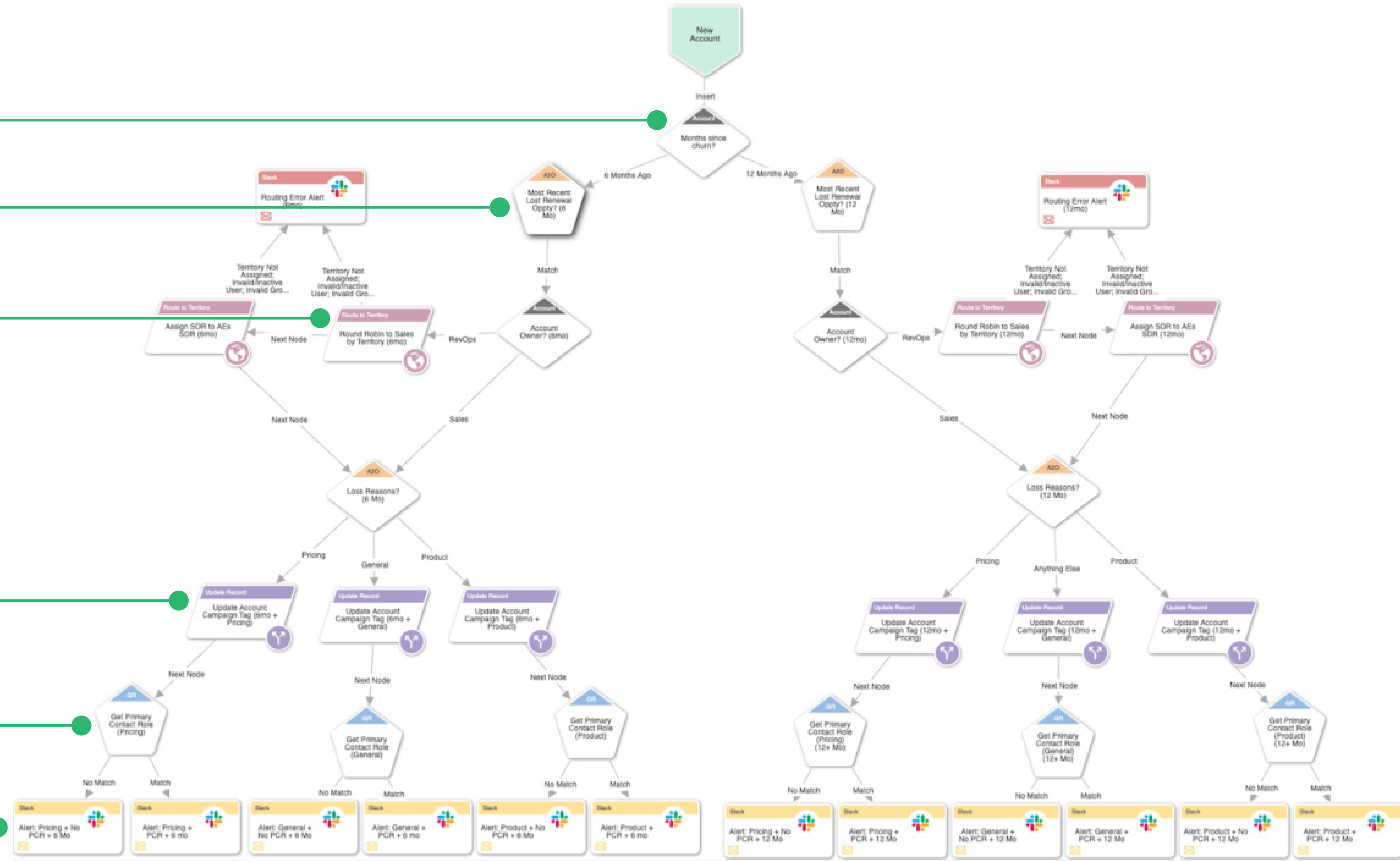
Matches the most recent lost renewal Opportunity based on lost reason.

Round Robins the Account if unassigned.

Updates campaign field based on lost reason.

Finds Primary Contact Role on lost renewal Opportunity.

Sends customized Slack alert to AE/SDR.



Salesforce Reporting

In addition to LeanData automation and Slack alerts, the LeanData RevOps team supplies a library of Salesforce reports that provide further detail on former customer Accounts. These reports are divided into three categories:

- Opportunity Reports
- Contact Reports
- Account Reports

These reports contain contextual information such as former customers who may be LeanData Certified or former customers who fit our ideal customer profile (ICP).

COORDINATED OUTREACH

To provide even more support for the Win Back Play, the RevOps Team maintains two Outreach Sequences that are customized based on the Opportunity Lost reason.

Sales reps are also trained to leverage internal relationships for warm introductions and additional context. Churned customers may be interested in new features and releases since the Account's churn date. With help from Marketing and Demand Gen, churned customers are often invited to exclusive events at upcoming conferences. And last, Sales Leadership may approve special offers, incentives or discounts for a churned customer to come back.

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Play #3: Sales Process Plays

Lead Management 101

Whether your company is working with Leads, Contacts, or Opportunities, there are many foundational components to the overall lead management process. For example, there must be consistency and consensus on issues like:

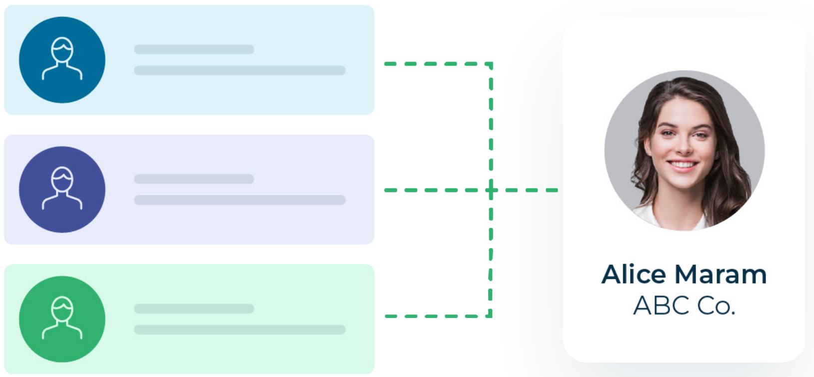
- How will leads be qualified?
- How do you divide up named accounts and territories?
- If an account is unnamed, who gets the account?
- If an account is not worked in a reasonable amount of time, what happens?
- How can a sales rep drop an account?

To add further complexity, lead distribution is a moving target. Territories change. Deal sizes change. Your company's products change. Sales team members get promoted, take time off, change verticals, and well, quit.

There will always be a need for the Sales Team and RevOps to adjust round robins, modify sales pools, balance territories and set up schedules such as working hours, vacations, and regional holidays to ensure lead equitability.

Relying on manual processes for lead management is a spreadsheet nightmare that will negatively impact pipeline — especially for large Sales teams.

So, **to save time and build a more efficient, scalable process,** the LeanData Sales and RevOps teams automate the process of adding accounts and unassigning accounts. These two automations are known as "Account Needs Review" and "Add as Named Account."



Account Needs Review

The purpose of the Account Needs Review automation is to build an unassignment process driven by AE review and manager approval. Automating this process has three benefits:

1. It's easier for AEs to get to their ideal number of named accounts.
2. It creates a better feedback loop for RevOps to understand why accounts are being dropped.
3. It gives AEs more autonomy over their book of business.

Accounts are automatically moved into a "Needs Review" status when they meet specific unassignment criteria.

LeanData is running a nightly job to look for the following:

- Account has been assigned for 90+ days
- AND there are no open opportunities
- AND it's not in a purchase/decision Buying Stage
- AND there is no activity in the last 28 days
- AND there are no future activities

The LeanData platform will send an automated alert via Slack or email to the corresponding sales rep when their Account has been moved into the "Needs Review" status. The alert contains contextual information and notifies the rep they have 30 days to take action before the Account will be unassigned.

The sales rep then has three options:

1. Do nothing and the automation will automatically drop the account
2. Re-engage with the Account or,
3. Submit an Add/Drop Request to keep or drop the Account

The AE will receive a Slack alert when their request has been approved or rejected.

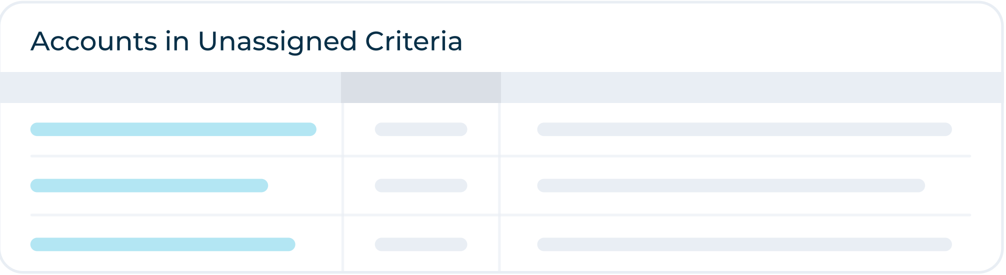
Account Needs Review Play

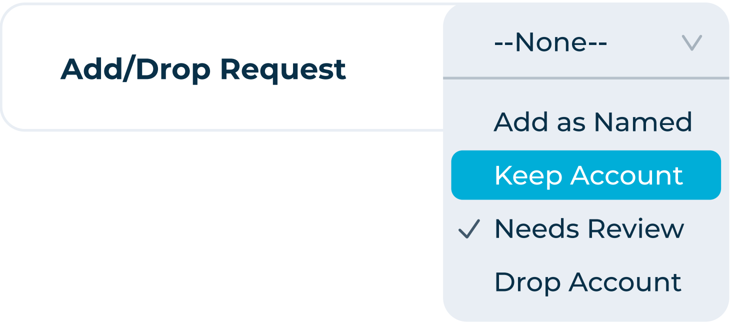
1 When account meets Unassignment Criteria, AE gets notified via Slack: "Add/Drop Request" gets auto-updated to **"Needs Review"**

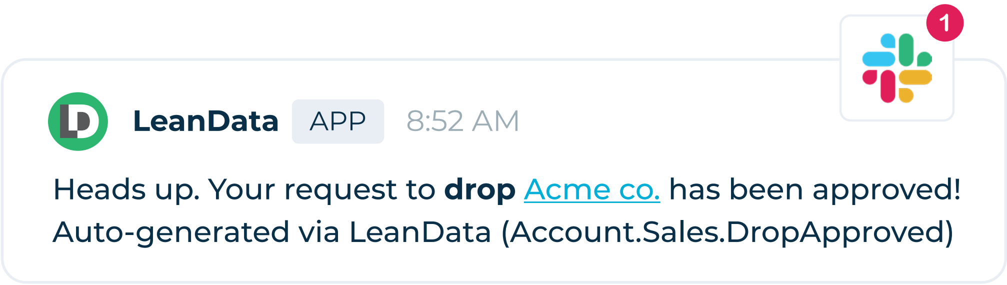
2 AE has 30 days to review Accounts in "Needs Review" and take action:
1. Reach out
2. Or, update **Add/Drop Request** to Keep or Drop

3 Managers review request

4 AE will receive a **Slack alert** when their request has been approved/rejected







Add as Named Request

In the past, when an AE found an Account they wanted to add, they would send a Slack message or email to their Manager, requesting the change. The Manager would then update the Account in Salesforce or send a spreadsheet of changes to RevOps so adjustments could be made in bulk. This was not an efficient use of the Sales Manager's time.

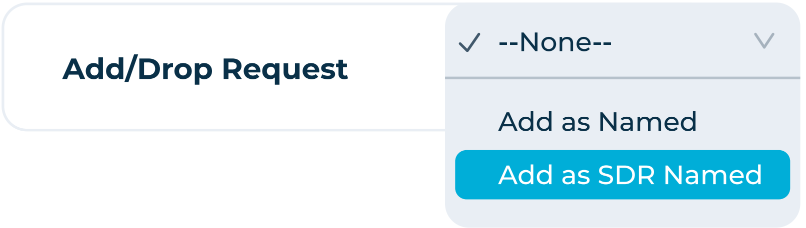
To streamline this process, and to give sales reps more control over their Accounts, the LeanData RevOps team automates these steps, known as the "Add as Named Request."

The Add as Named Request follows these simple steps: this one is in the live graph because we want to take action on these in real time instead of waiting for a nightly job

1. AE finds the Account they want to add.
2. AE updates the Add/Drop Request in Salesforce to Add as Named on the Account record.
3. The appropriate Manager approves or rejects the request (when this is updated, this triggers LeanData live graph).
4. The Account is auto-updated.

Add as Named Request Play

1. When an Account meets Unassignment Criteria, AE gets notified via Slack: "Add/Drop Request" gets auto-updated to **"Needs Review"**



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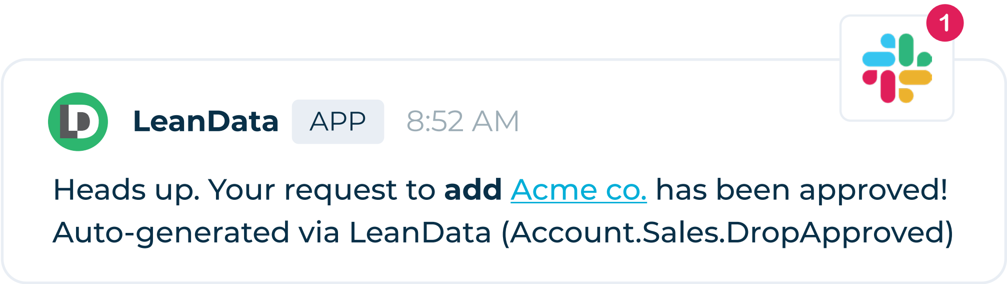
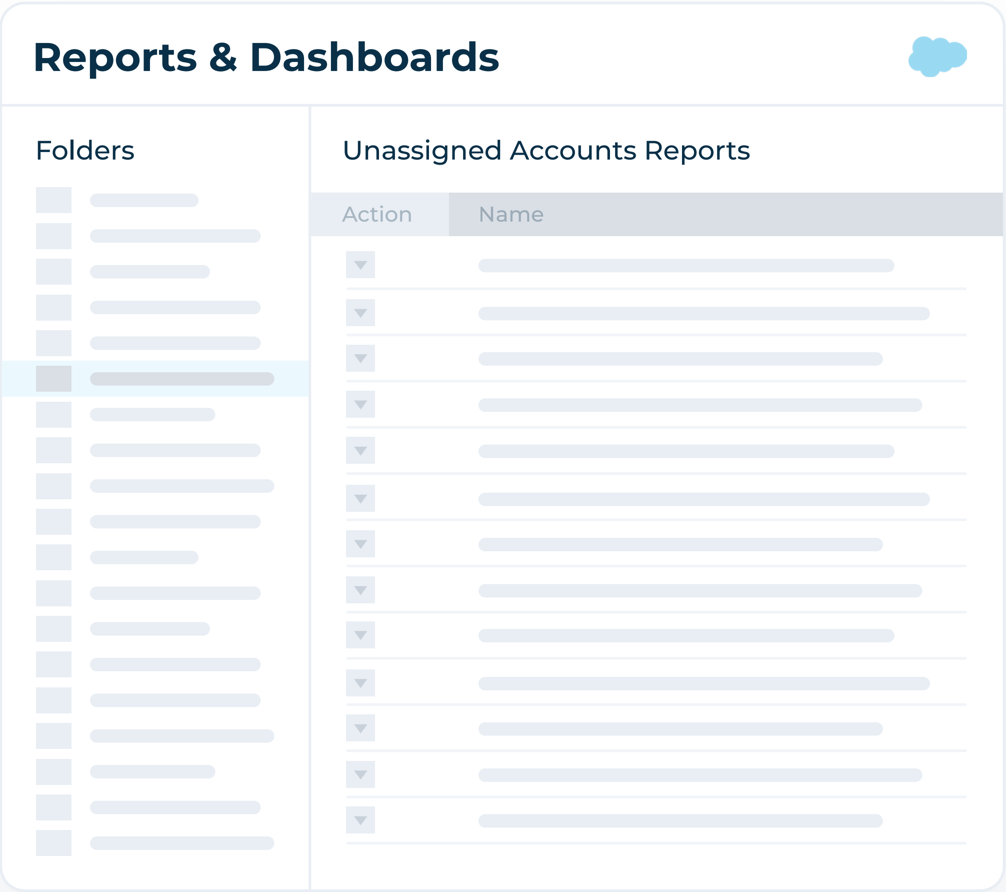


Reports & Dashboards

Both the Account Needs Review and the Add as Named Request automations are supported by reports and dashboards the LeanData Revops team has created in Salesforce.

Sales reps can view a report of their Accounts in “Needs Review” status. In addition, to help with prospecting, sales reps can view Unassigned Accounts reports, divided by territory and segment.



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Play #4: Renewal & Upsell Plays

Renewal & Upsell Plays

In a down market when new customers are harder to acquire, one of the best ways to weather the storm is to strengthen your existing customer base by preventing churn or uncovering untapped revenue through upsells.

This is one of the hallmarks of account-based customer marketing (ABCM), a strategy that focuses on cultivating stronger relationships with high-value accounts. However, successful customer marketing often requires unique messaging and content tailored to specific needs, a challenging process to scale.

Within its playbook arsenal, the LeanData RevOps team uses two renewal plays to strengthen customer accounts: “Renewal Opportunity Motion” and “Upsell Opportunity Motion.” Both plays are easily scaled and customized with the power and flexibility of LeanData Revenue Orchestration.

Renewal Opportunity Motion

Renewal rate is an important metric for subscription-based businesses since it's one of the most reliable ways to gauge customer satisfaction and loyalty. At renewal decision time, a customer can either 1) churn, 2) renew the existing contract or 3) add additional products or services.

To stay on top of customer renewals in a personal, yet automated, scalable way, LeanData's RevOps team activates the Renewal Opportunity Motion.

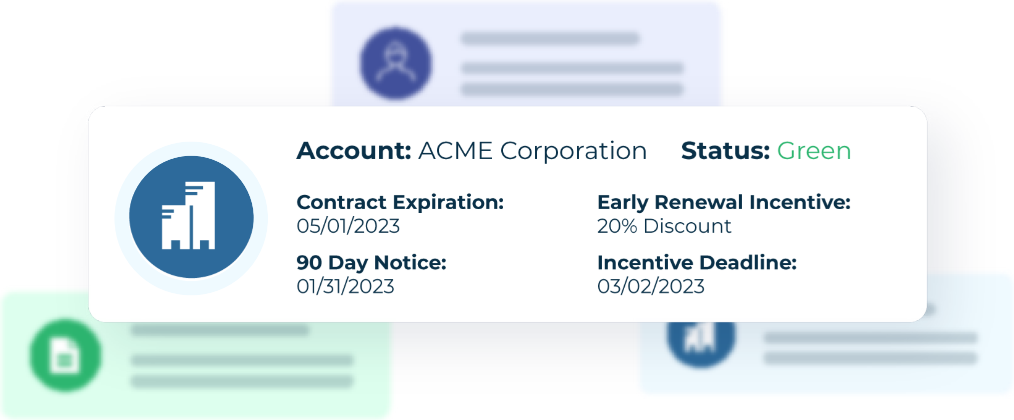
HOW IT WORKS

The LeanData Routing Scheduler runs a daily scheduled job to look for accounts that are 120, 90, and 60 days out from renewal. This scheduled job is based on a "Days from Renewal" field on the account. If an open renewal opportunity is 120, 90, or 60 days from renewal, LeanData FlowBuilder logic checks to see if that opportunity is in the stage it should be, based on our unique renewal motion.

If the opportunity is not in the correct stage, the LeanData automation performs two actions:

1. Creates a Salesforce task for the appropriate account manager (AM) with specific action items.
2. Sends a "missed service level agreement (SLA)" Slack alert to the AM assigned to the opportunity.

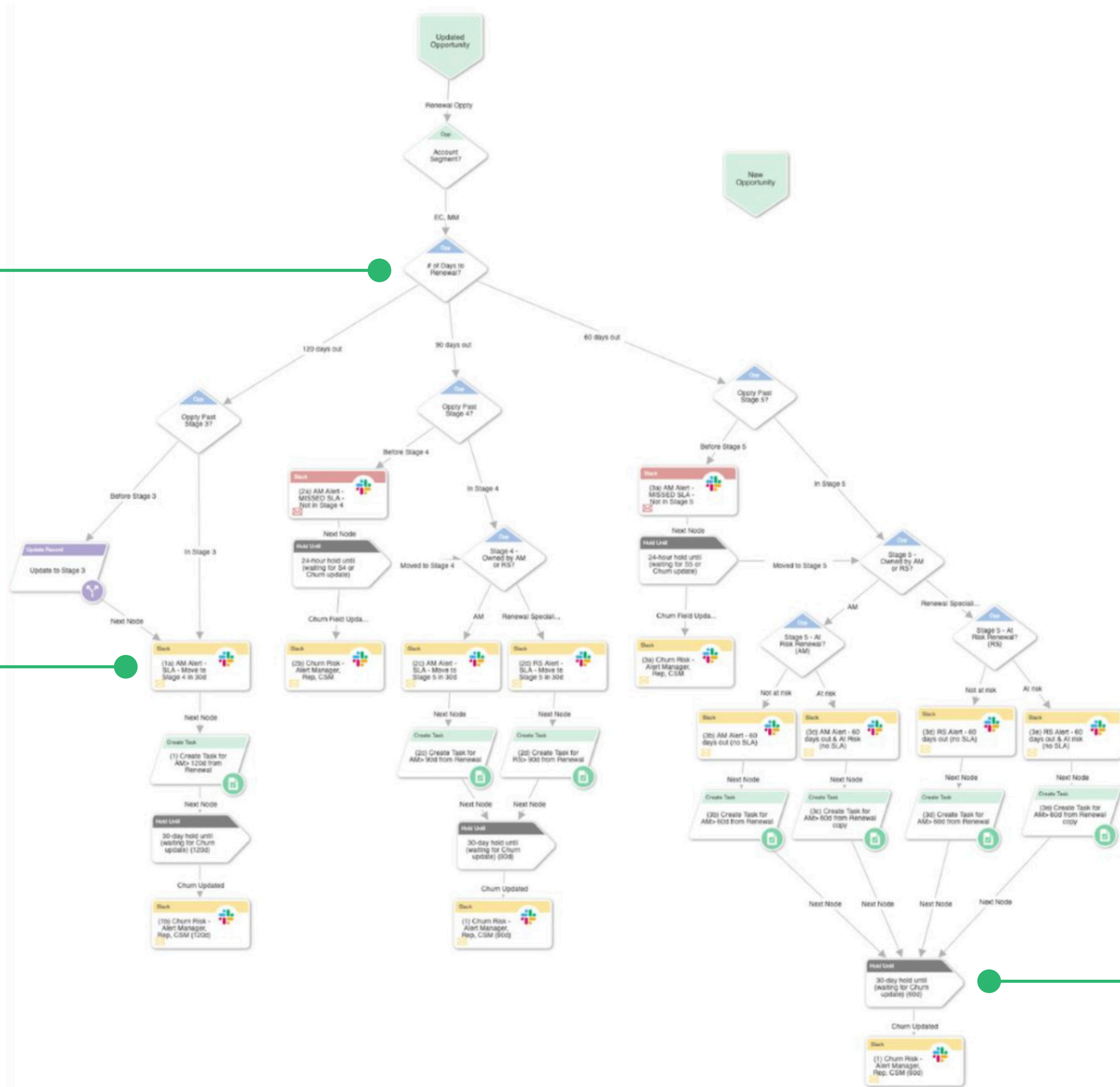
Additionally, if opportunities are at risk for churn based on fields or criteria in Salesforce like low Ebsta score, no primary quote created, churn risk notes, or account health score, LeanData automation can bubble those opportunities up to AM leadership through Slack and email alerts as well as generate a detailed report of all overage opportunities.



Renewal Opportunity Motion

Number of days to renew

Slack alerts for SLAs



Task Creation in Salesforce

“Hold Until” Nodes

Upsell Opportunity Creation

It's a common occurrence: customers often exceed the number of licenses purchased in their software contract, also known as "usage overage." This is good news!

Typically, if your customer is using more of your product, there's increased revenue potential through upsell opportunities. Your customer may need to upgrade to a higher tier or a more comprehensive software package that better suits their needs.

To automate overage alerts in LeanData and put the upsell into motion, the LeanData RevOps team implements the Upsell Opportunity Creation play.

HOW IT WORKS

The LeanData platform monitors customer account records in Salesforce by comparing the licenses with usage. When Users Routed exceeds Users in Contract by a predefined percentage, LeanData creates an "Overage Opportunity" in Salesforce and routes the opportunity to the AM.

This flow signals the AM to begin a discussion with the customer to purchase more licenses. Once the customer account is in this state for 30 days, the LeanData platform will create an upsell opportunity, again alerting the appropriate AM.

The AM then checks with the customer if the overage is valid. The customer is given the option to either reduce their number of users to come into compliance or agree to the upsell.

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Play #5: Partner Play

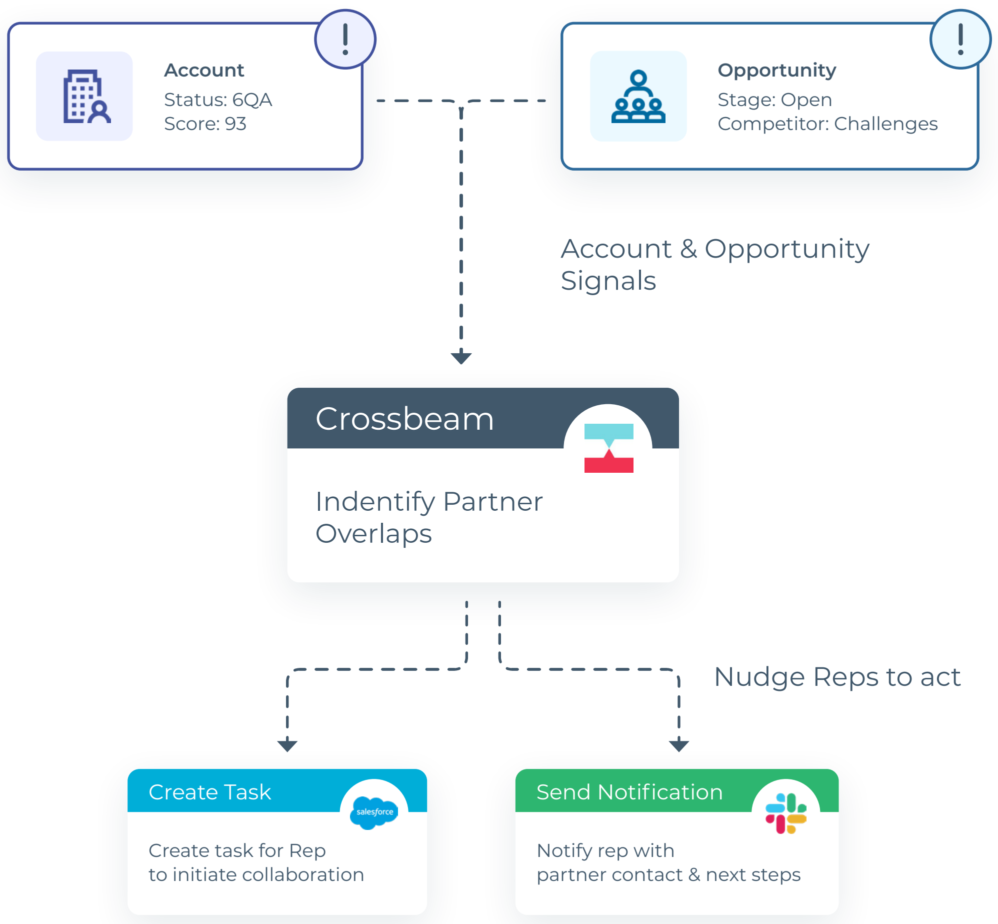
The Right Partner Can Get Your Deals Unstuck

Partner data is gold, but being able to bubble up the right information at the right time for revenue teams requires alignment between RevOps and Partner teams.

Unfortunately, Partner teams often spend too much time manually driving collaboration. Typically, Partner teams have to surface opportunities by combing through data manually, trying to determine which partner to use at a particular stage of the buying journey. Then, the Partner team spends even more time communicating their findings to the Sales team.

To solve for this Partner/RevOps misalignment and eliminate manual processes, LeanData uses Crossbeam and LeanData solutions together to automate partner data and accelerate deals.

Crossbeam is a partner ecosystem platform that acts as an escrow service for data, allowing companies to find overlapping customers and prospects with their partners. The LeanData Revenue Orchestration platform includes a specific integration node for Crossbeam.



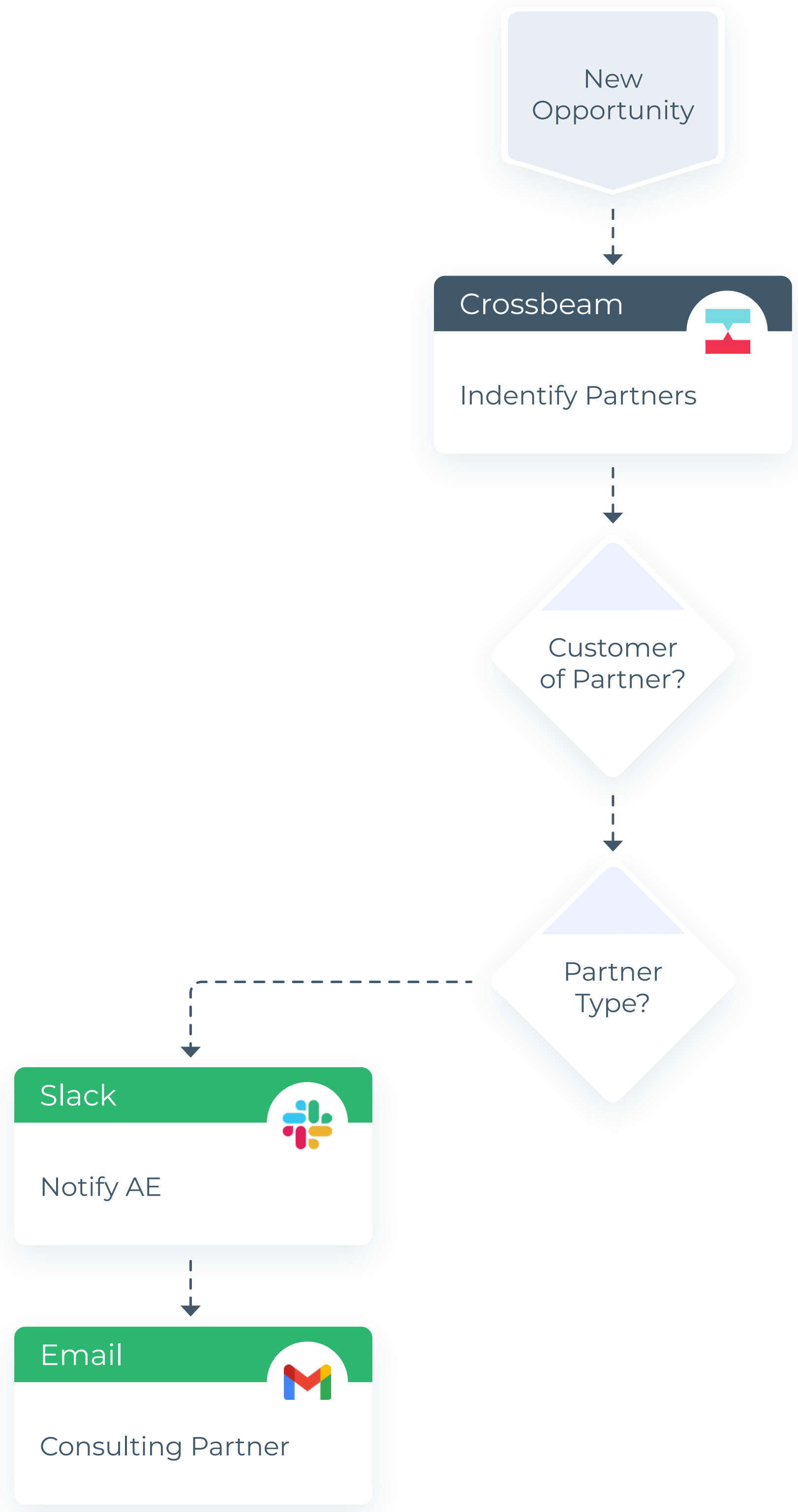
Deals close 46% faster and are 53% more likely to close when a partner is involved.

(2023 State of the Partner Ecosystem)

The LeanData-Crossbeam Partner Play

Whether at the Account level or the Opportunity level in Salesforce, LeanData automation looks at an Open Opportunity, identifies partner relationships, creates a task in Salesforce for the sales rep to initiate collaboration, and sends a Slack notification to the sales rep that includes partner context and next steps.

Then, to create an even better implementation experience, a similar Slack notification is sent to a member of the LeanData Professional Services team when a deal closes. This notification shares the new customer's partner technology overlaps to ensure that during the implementation process, the PS team member is driving integration adoption.



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Free Your Time Through Automation

Free Your Time Through Automation

LeanData is the driving force behind the powerful automation and workflow processes that streamline our entire revenue process. It touches EVERY part of our business:

- Inbound lead assignment
- Deduping
- Auto Lead conversion
- Round Robin pools
- SDR to AE handoffs
- Territory management
- Account assignment
- Partner overlap and collaboration
- Contact job change plays (powered by UserGems)
- Automating Contact role assignments
- Opportunity assignments
- Deal stage change alerts
- Sales to Customer Success handoffs
- Renewal and upsell motions
- Case routing and escalation alerts

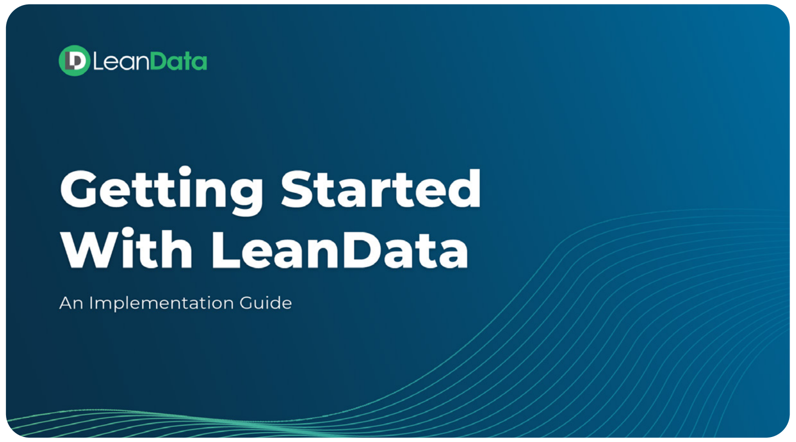
The LeanData RevOps team is able to work efficiently, automate, and scale revenue processes everyday by using LeanData Revenue Orchestration.

Some people think of LeanData as simply a matching and routing tool, but the platform can do so much more. In fact, one of the most common adjectives used to describe LeanData in G2 reviews is “robust.”

Whether you’re in RevOps, SalesOps, or MOps, you carry the weight of the tech stack on your shoulders. Sales, Marketing, and Customer Success teams rely on you for everything from large-scale process builds to list uploads.

Wouldn’t you like to free your time for that valuable project you know will make a difference at your company?

Recommended Resources

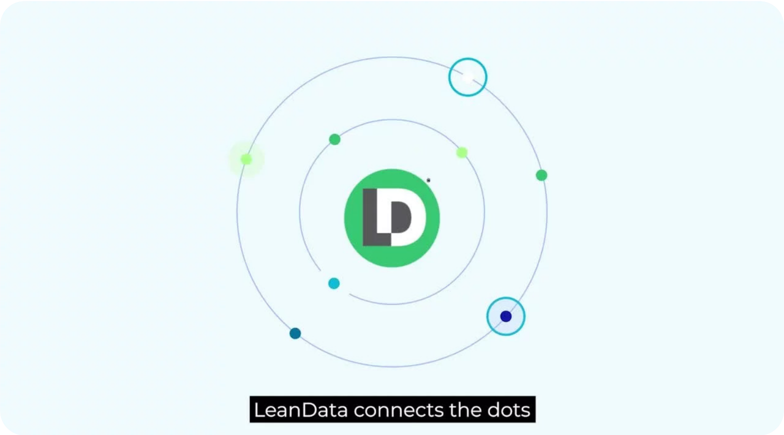


GUIDE

Getting Started With LeanData: An Implementation Guide

REPORT

G2 Report: Lead-to-Account Matching and Routing, Winter 2024



VIDEO

LeanData Demo in 100 Seconds

Get Started Today:

Visit **LeanData.com** to learn more about LeanData's go-to-market operations solutions for Automated Scheduling, Matching, Routing and Engagement, or visit us on **AppExchange.**

Request Demo

Why LeanData?

Today's growth leaders power their B2B selling with LeanData, the gold standard in modern revenue orchestration and an essential element of the modern RevTech stack. The LeanData Revenue Orchestration Platform, powered by No-Code Automation, simplifies and accelerates coordination of all the people, processes and plays needed to transform buyer signals into buying decisions. LeanData is inspiring a global movement among its 1,000+ customers and community of 5,000+ OpsStars worldwide, empowering them with revenue operations excellence that translates into compelling buyer experiences and competitive advantage.